

**COUNTY OF SAN LUIS OBISPO BOARD OF SUPERVISORS
AGENDA ITEM TRANSMITTAL**

(1) DEPARTMENT Human Resources	(2) MEETING DATE 8/12/2014	(3) CONTACT/PHONE Tom Bordonaro, Assessor 781-5643 Tami Douglas-Schatz, Human Resources Director 781-5959	
(4) SUBJECT Submittal of a resolution to 1) establish the new classification salary range of Property Transfer Technician IV; 2) approve the salary range for Supervising Property Transfer Technician and Assessment Technician class series; and 3) amend the Position Allocation List for Fund Center 109-Assessor, by deleting 9.00 FTE Administrative Assistant series, Property Transfer Technician I or II, 2.00 FTE Property Transfer Technician III and adding 9.00 FTE Property Transfer Technician I, II or III and 2.00 FTE Property Transfer Technician IV. All Districts.			
(5) RECOMMENDED ACTION It is recommended that the Board approve the resolution 1) establishing the new classification and salary range of Property Transfer Technician IV; 2) approving the salary range for Supervising Property Transfer Technician and Assessment Technician class series; and 3) amending the Position Allocation List (PAL) for Fund Center 109 by deleting 9.00 FTE Administrative Assistant series, Property Transfer Technician I or II, 2.00 FTE Property Transfer Technician III and adding 9.00 FTE Property Transfer Technician I, II or III and 2.00 FTE Property Transfer Technician IV.			
(6) FUNDING SOURCE(S) Current Department Budget	(7) CURRENT YEAR FINANCIAL IMPACT \$0.00	(8) ANNUAL FINANCIAL IMPACT \$69,341.00	(9) BUDGETED? Yes
(10) AGENDA PLACEMENT <input checked="" type="checkbox"/> Consent <input type="checkbox"/> Presentation <input type="checkbox"/> Hearing (Time Est. ____) <input type="checkbox"/> Board Business (Time Est. ____)			
(11) EXECUTED DOCUMENTS <input checked="" type="checkbox"/> Resolutions <input type="checkbox"/> Contracts <input type="checkbox"/> Ordinances <input type="checkbox"/> N/A			
(12) OUTLINE AGREEMENT REQUISITION NUMBER (OAR) N/A		(13) BUDGET ADJUSTMENT REQUIRED? BAR ID Number: N/A <input type="checkbox"/> 4/5 Vote Required <input checked="" type="checkbox"/> N/A	
(14) LOCATION MAP N/A	(15) BUSINESS IMPACT STATEMENT? No	(16) AGENDA ITEM HISTORY <input checked="" type="checkbox"/> N/A Date: _____	
(17) ADMINISTRATIVE OFFICE REVIEW Lisa M. Howe			
(18) SUPERVISOR DISTRICT(S) All Districts			

County of San Luis Obispo



TO: Board of Supervisors

FROM: Tom Bordonaro, Assessor
Tami Douglas-Schatz, Human Resources Director

DATE: 8/12/2014

SUBJECT: Submittal of a resolution to 1) establish the new classification salary range of Property Transfer Technician IV; 2) approve the salary range for Supervising Property Transfer Technician and Assessment Technician class series; and 3) amend the Position Allocation List for Fund Center 109-Assessor, by deleting 9.00 FTE Administrative Assistant series, Property Transfer Technician I or II, 2.00 FTE Property Transfer Technician III and adding 9.00 FTE Property Transfer Technician I, II or III and 2.00 FTE Property Transfer Technician IV. All Districts.

RECOMMENDATION

It is recommended that the Board approve the resolution 1) establishing the new classification and salary range of Property Transfer Technician IV; 2) approving the salary range for Supervising Property Transfer Technician and Assessment Technician class series; and 3) amending the Position Allocation List (PAL) for Fund Center 109 by deleting 9.00 FTE Administrative Assistant series, Property Transfer Technician I or II, 2.00 FTE Property Transfer Technician III and adding 9.00 FTE Property Transfer Technician I, II or III and 2.00 FTE Property Transfer Technician IV.

DISCUSSION

The County Assessor's Office is responsible for the valuation of residential and personal property for tax assessment purposes. As part of the office's staff development and succession planning efforts, the Assessor's Management Action Team completed a thorough review of the office's class specifications. The team's efforts resulted in the development of one new classification and updates to eleven other related classifications. The Civil Service Commission approved the following class specification revisions earlier this year:

- Appraiser Trainee I, II, III
- Supervising Appraiser
- Property Transfer Technician I, II, III, IV
- Supervising Property Transfer Technician
- Assessment Technician Supervisor

The Property Transfer Technician (PTT) class series is being presented to approve the new classification of PTT IV, establish the salary and amend the PAL. The Supervising Property Transfer Technician and Assessment Technician class series are being presented only for labor market compensation adjustments.

As currently allocated, in the Transfers and Exemptions Division, the Property Transfer Technician class series starts at the entry level with Administrative Assistant class series and continues through PTT III. This structure, however, is inconsistent with the related class series of Assessment Technician I, II, III or IV utilized in both the Public Service and Appraisal Support and Transfers and Exemptions Divisions. Approving the PTT IV classification and amending the PAL will provide consistency across these Divisions and will allow for greater flexibility in staffing.

In addition, the Administrative Assistant position has not been recently utilized by the Assessor's Office as the entry level

position when hiring Property Transfer Technicians. Common practice has been that vacancies are actually filled at the PTT I level instead of the AA I level for this Division. Therefore only three levels exist for this classification, other than the Supervisor position. However in the Public Service and Appraisal Support Division, the Assessment Technician career series has four levels of staff in their job classification, other than the AT Supervisor. These changes will provide for more effective succession planning, better staff cross training, and facilitate additional flexibility in assignments for staff and management.

The chart below details the changes to the Position Allocation Listing.

Current Allocations	FTE	Proposed Allocations	FTE
Administrative Assistant		Property Transfer Technician I	
or Property Transfer Technician I		or Property Transfer Technician II	
or Property Transfer Technician II	9.00	or Property Transfer Technician III	9.00
or Property Transfer Technician III	2.00	or Property Transfer Technician IV	2.00
Total	11.00	Total	11.00

The Supervising Property Transfer Technician class specification was updated to be consistent with the revisions made to the lower level PTT series. Moreover, it provides for uniformity with the related classification of Assessment Technician Supervisor. No PAL change is required for this classification. This classification is presented here to set the new salary range. This change will address internal alignment compensation issues between these two supervising classes and supports the staff development and succession planning efforts of the Assessor's Office.

The Assessment Technician I, II, III or IV is presented here to address external compensation labor market issues. Market analysis conducted by Human Resources indicated that these classifications were approximately 5% below market.

The updates to the classifications discussed above, provide uniformity between the classes and are consistent with the countywide classification plan. Similarly, the salary recommendations are appropriate for the respective classifications' level of duties, complexity, independence and decision making authority and reflect the County's salary setting methodology.

OTHER AGENCY INVOLVEMENT/IMPACT

The Civil Service Commission approved the changes to the Property Transfer Technician class series and related Supervisor class in April and June of 2014 respectively. Human Resources and the County Administrative Office support these recommendations.

FINANCIAL CONSIDERATIONS

The anticipated annual increase cost of the proposed changes is \$69,341. The Assessor's Office will absorb the cost through salary savings in FY 2014-15. On-going costs for these position adjustments will be part of future budgeting. The PTT series will be aligned with the AT series, each with four levels as proposed. All staff position or salary adjustments are reviewed and approved by Human Resources. Each staff member is being addressed individually, and some staff will not be effected. The financial considerations are summarized below:

Current FTE Positions	Classification	Annual Cost Increase Filled Positions
11.00	Property Transfer Technician Series	\$17,012
17.50	Assessment Technician Series	\$50,109
1.00	Supervising Property Transfer Technician	\$2,220
	Total Annual Cost Increase	\$69,341

RESULTS

This action will provide consistency in the classifications across the divisions the Assessor's Office. The outcome will provide for the Assessment Technician and Property Transfer Technician series to each have four levels with a

supervisor. This allows for more upward mobility opportunities for the PTT series, similar to the AT series. It also allows for staff to transfer between these two sections without any salary disparity. This greatly improves the long range succession planning efforts of the Department consistent with the Board's vision of a well-governed community.

The Position Allocation Listing Amendment is providing for two PTT IV positions, while removing the ineffective Administrative Assistant position from the PTT series. This will allow for better advancement opportunities in this division, while correcting a long-standing recruitment issue by removing the AA class from the series. The AT series is not impacted on the PAL.

Adjusting the Position Allocation Listing and compensation will allow for more effective succession planning, cross training, and facilitate flexibility in assignments for staff and management in accordance with the rules of the Civil Service Commission. This action will affect 11.00 FTE PTT positions as detailed in the table below:

Current Classification	Current FTE	New FTE
Property Transfer Technician I	3.00	3.00
Property Transfer Technician II	6.00	2.00
Property Transfer Technician III	2.00	4.00
Property Transfer Technician IV	0.00	2.00

The PAL Amendment does not change the total number of full time allocations for the Department.

ATTACHMENTS

1. PROPERTY TRANSFER TECH I-II-III-IV
2. CC 109 Assessor PTT Allocation & Salary 08-12-14